Roberts, Gregory J., of Barrus & Roberts (for Petitioner Margaret A. Ramirez, Administrator) Atty

> (1) First and Final Account of Administrator with Will Annexed and (2) Petition for its Settlement, for Allowance of Fees and for (3) Final Distribution

		its Settlement, for Allowance of Fees an	d for (3) Final Distribution
DC	DD: 8/27/1979	MARGARET A. RAMIREZ, daughter and Administrator with Will Annexed appointed on 6/13/2013 following the death of Executor PETRA MEDINA	NEEDS/PROBLEMS/COMM Paragraph 21(b) or states reimbursements.
		(DOD 10/13/2009), is Petitioner.	costs advanced ar
Co	ont. from	· ·	advanced of \$1,88 deducted from the
	Aff.Sub.Wit.	Account period: 8/27/1979 - 4/8/2014	of the estate prior
✓	Verified		However, Petition of
1	Inventory	Accounting - \$77,342.51 Beginning POH - \$13,000.00	specifically make o
Ľ	·	Ending POH - \$67,038.14	reimbursement of o
✓	PTC	(all cash)	nor is an itemization
1	Not.Cred.	<u> </u>	included with the F required by Local F
	Notice of	Administrator - \$3,093.70	the Court in its disc
√	Hrg	(statutory)	and approve reiml
1	Aff.Mail	Attorney - \$3,093.70	attorney of allowa
Ľ		(statutory)	advanced. Propos
	Aff.Pub.	(signerally)	amounts stated in
	Sp.Ntc.	Attorney XO - \$1,162.00	presuppose that co are reimbursable o
	Pers.Serv.	(per Declaration and itemization, for	die leiliboisable c
	Conf.	services from 7/25/2008 to 3/5/2014	Note: If Court determine
	Screen	[gap from 2008 to 2011], including sale of real property;)	accounting of the clo
	Letters 071007; 061313	sale of real property,)	warranted, Court will s
	Duties/Supp	Costs - \$1,886.50	Hearing as follows:
	Objections	(not itemized)	Monday, January 2 The Don't 202 for
	Video	1	a.m. in Dept. 303 for Accounting of \$10
	Receipt	Closing - \$10,000.00	Reserve.
	CI Report	(for closing expenses of administration, estate federal and	
1	9202	state income taxes consisting primarily	Pursuant Local Rule 7.
	Order	of capital gains tax on the real	noted above is filed 10
•	0.00.	property sale, and accounting fees;)	date listed, the hearing calendar and no app
			required. Filing of the i
		~Please see additional page~	accounting of closing
			generate a new heari
	Aff. Posting		Reviewed by: LEG
	Status Rpt		Reviewed on: 6/26/14
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice N/A		File 1 - Ramirez

MENTS:

of the Petition ent of attorney's and to be **86.50** shall be e remaining assets to distribution. does not a request for costs advanced, on of costs Petition as Rule 7.17(C) for cretion to consider bursement to able costs sed distribution proposed order costs advanced and approved.

ines an informal osing reserve is set a Status

26, 2015 at 9:00 for an Informal 0,000.00 Closing

.5, if the document 0 days prior to the ng will be taken off bearance will be informal reserve will not ing date.

Distribution pursuant to Decedent's Will is to:

- MANUELA FARIAS \$254.10 cash plus \$9,306.35 cash (from separate estate accounts);
- MARIANO RAMIREZ, JR. \$254.10 cash plus \$9,306.35 cash (from separate estate accounts);
- MARGARET A. RAMIREZ \$254.10 cash plus \$9,306.35 cash (from separate estate accounts);
- MARY JESUS LYLES \$254.10 cash plus \$9,306.35 cash (from separate estate accounts);
- DOLORES HERMOSILLO ROYBAL \$254.10 cash plus \$9,306.35 cash (from separate estate accounts).

Pimentel, Paul J. (for Cynthia Gerringer – Administrator/Petitioner)

Amended Waiver of Account and Petition for Allowance of Statutory Fees, and for Final Distribution

DO	D: 04/08/13		CYNTHIA GERRINGER, Administrator, is	NEEDS/PROBLEMS/COMMENTS:
			Petitioner.	
			Accounting is waived.	Note: The Mutual Release and Settlement Agreement between the parties is attached to the petition as
Со	nt. from		I & A - \$244,618.76	Attachment 1.
	Aff.Sub.Wit.		POH - \$110,367.10	
✓	Verified			
✓	Inventory		Administrator \$8,439.50	
✓	PTC		(statutory)	
✓	Not.Cred.		Attorney - \$8,439.50	
✓	Notice of		(statutory)	
	Hrg			
✓	Aff.Mail	w/	Closing - \$1,000.00	
	Aff.Pub.		Distribution, pursuant to intestate	
	Sp.Ntc.		succession and subject to settlement	
	Pers.Serv.		agreement, is to:	
	Conf.			
	Screen		Eleanor Copeland - \$46,244.06	
	Letters 06/27/	′13	Cynthia Gerringer - \$23,122.02,	
	Duties/Supp		plus ½ interest in household furniture &	
	Objections		furnishings valued at \$500.00	
	Video			
	Receipt		John Marin - \$23,122.02,	
√	CI Report		plus ½ interest in household furniture &	
∨	9202 Order		furnishings valued at \$500.00	
\vdash	Aff. Posting			Reviewed by: JF
	Status Rpt			Reviewed by: 3F Reviewed on: 06/26/14
	UCCJEA			Updates:
	Citation			Recommendation:
√	FTB Notice			File 2A - Copeland
				27. Copolana

2A

Atty Sanoian, Joanne (for Cynthia Gerringer – Administrator)
Atty CAIN, THOMAS W. (for Eleanor Copeland – Objector)

Petition to Determine Heirship

2C Rebecca W. Copeland (Estate)

Case No. 13CEPR00444

Atty Pimentel, Paul J. (for Cynthia Gerringer – Administrator/Petitioner)

Atty CAIN, THOMAS W. (for Eleanor Copeland – Objector)

Status Hearing Re: Settlement Agreement

DOD: 04/08/13		CYNTHIA GERRINGER, Administrator,	NEEDS/PROBLEMS/COMMENTS:
		filed a Report on Waiver of Account and	
		Petition for its Settlement, etc. on	Continued from 06/10/14
		11/20/13.	
Co	ont. from 052314,	FIFANOR CORFIAND was the sun of	Need updated status report
	1014	ELEANOR COPELAND, mother of decedent's predeceased spouse, filed	regarding settlement agreement.
	Aff.Sub.Wit.	Objections to Report and Waiver of	agreement.
	Verified	Account and Objections to Petition for	
	Inventory	its Settlement and a Petition to	
	PTC	Determine Heirship on 01/13/14.	
		-	
	Not.Cred.	On 03/26/14, the parties engaged in a	
	Notice of	Settlement Conference. Minute Order	
	Hrg	from Settlement Conference set this	
	Aff.Mail	matter for Status Re: Settlement	
	Aff.Pub.	Agreement and states: The Court notes that Ms. Nichols has been authorized to	
	Sp.Ntc.	enter into an agreement on behalf of	
	Pers.Serv.	Eleanor Copeland. Parties engage in	
	Conf.	settlement discussions with the Court.	
	Screen	Parties reach a resolution. Upon inquiry	
	Letters	by the Court, each party individually	
	Duties/Supp	agrees to the terms and conditions of	
	Objections	the settlement. Counsel to prepare the	
	Video	agreement.	
	Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		Reviewed by: JF
	Status Rpt		Reviewed on: 06/26/14
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 2C - Copeland
			20

Atty Petty, Jonathon L., sole practitioner (for Petitioner Alex Brehm, Administrator)
Atty Wright, Judy, of Wright & Wright (for Petitioner Alex Brehm, Administrator)

Amended First and Final Report of Administrator; Petition for Final Distribution Without an Accounting and for Allowance of Compensation for Ordinary Services

DC	D: 6/8/2013		ALEX BREHM, family friend and Administrator, is	NEEDS/PROBLEMS/COMMENTS:
			Petitioner.	Statutory fee calculation
			Accounting is waived.	may use an incorrect
Со	nt. from		I & A — \$160,850.00	sum for losses, based upon Paragraph 7 of
	Aff.Sub.Wit.		POH — \$165,287.65	the Petition, which states the total of sales of
✓	Verified		(\$130,287.65 is cash)	tangible personal
✓	Inventory		Administrator — [\$6,987.54 ?]	property both as
✓	PTC		(statutory)	\$25,584.56 and as \$24,584.56 . Losses on
✓	Not.Cred.		Attorney Petty — [\$2,987.54 ?]	those sales may
1	Notice of		(statutory, to be allocated between Petitioner's former and current law firms;)	therefore be either \$5,415.44 or \$4,415.44, in
	Hrg Aff.Mail	W/	,	which case the latter
✓		VV/	Attorney Wright — \$4,000.00 (statutory, to be allocated between Petitioner's	sum for losses would result in the statutory fee
	Aff.Pub.		former and current law firms;)	base as \$200,584.56
	Sp.Ntc. Pers.Serv.		Closing — \$2,000.00	rather than \$199,584.60 as stated in Paragraph
	Conf.		(any liabilities)	19 of the Petition, with
	Screen			the statutory fee
	Letters		Distribution pursuant to intestate succession is to:	calculating as \$7,011.69.
	Duties/Supp Objections			
	Video		GEOFFREY WORSTELL – \$39,656.29 cash, and	
	Receipt		100% interest in real property (consent to	
	CI Report		distribution attached as Exhibit B);	
✓	9202		NANCY CALDWELL-HERSHORIN - \$74,656.28 cash	
✓	Order		(consent to distribution attached as Exhibit B).	
-	Aff. Posting Status Rpt			Reviewed by: LEG Reviewed on: 6/26/14
	UCCJEA			Updates:
	Citation			Recommendation:
✓	FTB Notice			File 3 - Worstell

4 Fred Otto Loeffler (CONS/PE)

Case No. 13CEPR00655

Atty Downing, Marcella (for Diane Huerta – daughter)

Atty Bagdasarian, Gary (for Linda Plitt – daughter)

Atty Rube, Melvin K. (for Fred & Kathleen Loeffler – proposed conservatees)

Atty Janisse, Ryan (for Mick Loeffler – son)

Atty Johnson, Summer A. (for Bruce Bickel – temporary conservator of the estate)

Probate Status Hearing Re: Status of Conservatorship, Settlement of Case & Accounting of Temporary Conservatorship

	On 07/26/13, DIANE HUERTA and LINDA PLITT, NEEDS/PROBLEMS/COMMENTS:			
		daughters, filed a Petition for Appointment of	14LLD3/1 ROBLEMS/COMMENTS.	
 		Probate Conservator of the Person and Estate.		
—		On 07/29/13, the Court granted the Petition for		
		Appointment of Temporary Conservator of the		
Co	nt. from	Person and Estate pending the hearing on the		
	Aff.Sub.Wit.	temporary conservatorship.		
	Verified			
	Inventory	Proposed Conservatee and Mick Loeffler, son,		
	PTC	filed objections to the conservatorships.		
	Not.Cred.			
	Notice of	On 08/19/13, after an evidentiary hearing, the		
	Hrg	court found that there was no emergency		
	Aff.Mail	requiring a temporary conservatorship.		
	Aff.Pub.			
	Sp.Ntc.	On 09/18/13, Judge Black set the matter for trial		
	Pers.Serv.	and after reviewing additional documents, took		
	Conf.	the matter of a temporary conservatorship under		
	Screen	submission and on 09/25/13, signed an Order appointing Bruce Bickel as temporary		
	Letters	= conservator of the Estate.		
	Duties/Supp	Conservator of the Estate.		
	Objections	In addition to the conservatorship petition, Diane		
	Video	and Linda also filed a Petition to Determine		
	Receipt	Validity of the Trust, etc. on 08/19/13. After a		
	CI Report	hearing in that matter, Bruce Bickel was		
	9202	appointed as temporary trustee of the Trust.		
	Order	<u> </u>		
	Aff. Posting	The parties participated in settlement	Reviewed by: JF	
	Status Rpt	conferences on 11/07/13, 01/07/14, 02/20/14 and	Reviewed on: 06/26/14	
	UCCJEA	04/02/14 and participated in mediation with	Updates:	
	Citation	Judge Howard Broadman (ret.) on 05/17/14.	Recommendation:	
	FTB Notice		File 4 – F. Loeffler	
		At mediation on 05/17/14, the parties reached		
		and executed a settlement agreement.		
		On 04/19/14 a Potition for Approval of		
		On 06/19/14, a Petition for Approval of Settlement Agreement was filed by Bruce Bickel		
		and is set for hearing on 07/15/14 at 3:30 in Dept.		
		502.		
		JUZ.		

5 Kathleen Doris Loeffler (CONS/PE)

Case No. 13CEPR00656

Atty Downing, Marcella (for Diane Huerta – daughter)

Atty Bagdasarian, Gary (for Linda Plitt – daughter)

Atty Rube, Melvin K. (for Fred & Kathleen Loeffler – proposed conservatees)

Atty Janisse, Ryan (for Mick Loeffler – son)

Atty Johnson, Summer A. (for Bruce Bickel – temporary conservator of the estate Probate Status Hearing Re: Status of Conservatorship, Settlement of Case &

Accounting of Temporary Conservatorship

Accounting of Temporary Conservatorship				
	On 07/26/13, DIANE HUERTA and LINDA PLITT,	NEEDS/PROBLEMS/		
	daughters, filed a Petition for Appointment of	COMMENTS:		
	Probate Conservator of the Person and Estate.			
	On 07/29/13, the Court granted the Petition for			
Camb frame	Appointment of Temporary Conservator of the			
Cont. from	Person and Estate pending the hearing on the			
Aff.Sub.Wit.	temporary conservatorship.			
Verified				
Inventory	Proposed Conservatee and Mick Loeffler, son,			
PTC	filed objections to the conservatorships.			
Not.Cred.				
Notice of Hrg	On 08/19/13, after an evidentiary hearing, the			
Aff.Mail	court found that there was no emergency			
Aff.Pub.	requiring a temporary conservatorship.			
Sp.Ntc.	On 09/18/13, Judge Black set the matter for trial			
Pers.Serv.	and after reviewing additional documents, took			
Conf. Screen	the matter of a temporary conservatorship under			
Letters	submission and on 09/25/13, signed an Order			
Duties/Supp	appointing Bruce Bickel as temporary conservator			
Objections	of the Estate.			
Video				
Receipt	In addition to the conservatorship petition, Diane			
CI Report	and Linda also filed a Petition to Determine			
9202	Validity of the Trust, etc. on 08/19/13. After a			
Order	hearing in that matter, Bruce Bickel was			
Aff. Posting	appointed as temporary trustee of the Trust.	Reviewed by: JF		
Status Rpt	The parties participated in settlement	Reviewed on: 06/26/14		
UCCJEA	The parties participated in settlement	Updates:		
Citation	conferences on 11/07/13, 01/07/14, 02/20/14 and	Recommendation:		
FTB Notice	04/02/14 and participated in mediation with Judge Howard Broadman (ret.) on 05/17/14.	File 5 – K. Loeffler		
	30age 110ward broadman (1e1.) 011 03/17/14.			
	At mediation on 05/17/14, the parties reached			
	and executed a settlement agreement.			
	and oxocorod a somethorn agreement.			
	On 06/19/14, a Petition for Approval of Settlement			
	Agreement was filed by Bruce Bickel and is set for			
	,			
	hearing on 07/15/14 at 3:30 in Dept. 502.			

Watson, Dennis L. (for Marguerite Hughes – Administrator with Will Annexed)
Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 4-30-13	MARGUERITE HUGHES was appointed as	NEEDS/PROBLEMS/COMMENTS:
3337.33	Administrator with Will Annexed on	
	11-18-13 with bond of \$550,000.00.	Continued from 4-18-14, 6-6-14
2 1 242224		
Cont. 041814,	Bond was filed on 1-14-14 and Letters	Minute Order 4-18-14:
060614	issued on 1-23-14.	No appearances. Matter continued
		to 6-6-14. The Court orders Dennis
Aff.Sub.Wit.	At the hearing on 11-18-13, the Court	Watson to be personally present on
Verified	set this status hearing for the filing of the	6-6-14 if the inventory and appraisal
Inventory	Inventory and Appraisal.	has not been filed.
PTC		A copy of the minute order was
Not.Cred.		mailed to Mr. Watson on 4-18-14.
Notice of		
Hrg		Minute Order 6-6-14: No
Aff.Mail		appearances. The Court sets the
Aff.Pub.		matter for an Order to Show Cause
Sp.Ntc.		on 7-1-14 regarding failure to appear and imposition of sanctions in the
Pers.Serv.		amount of \$500.00. Dennis Watson is
Conf.		ordered to be personally present.
Screen		
Letters		The Order to Show Cause and Minute
Duties/Supp		Order were mailed to Attorney Watson on 6-16-14.
Objections		waison on 6-16-14.
Video		Note: The Inventory and Appraisal
Receipt		was filed on 6-23-14.
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 6-25-14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 6A – Peters
		4.6

6A

6B Atty

Watson, Dennis L. (for Marguerite Hughes – Administrator with Will Annexed)

Order to Show Cause Re: Failure to Appear; Imposition of Sanctions in the Amount of \$500.00

DOD: 4-	-30-13	MARGUERITE HUGHES was appointed as	NEEDS/PROBLEMS/COMMENTS:
		Administrator with Will Annexed on 11-18-13 with bond of \$550,000.00.	Note: The I&A was filed on 6-23-14.
		= 11-16-13 WIIII DONA OI \$550,000.00.	Note. The I&A was filed on 6-25-14.
		Bond was filed on 1-14-14 and Letters	
<u> </u>		issued on 1-23-14.	
	Sub.Wit.		
	ified	At the hearing on 11-18-13, the Court	
 	entory	set status hearing for the filing of the Inventory and Appraisal.	
PTC		= Invertiory and Applaisal.	
	.Cred.	There were no appearances at the	
	ice of	status hearings on 4-18-14 and 6-6-14.	
Hrg	i i	On 6-6-14, the Court set this Order to	
 	Mail	Show Cause re sanctions in the amount	
 	Pub.	of \$500.00 and ordered Attorney	
Sp.N	Ţ	Watson to be personally present.	
=====	s.Serv.	=	
Con			
Lette		-	
 	ies/Supp	=	
	ections	=	
Vide			
	eipt		
CI R	Report		
9202	2		
Ord	ler		
Aff.	Posting		Reviewed by: skc
 	tus Rpt		Reviewed on: 6-25-14
 	CJEA	_	Updates:
l	ation	4	Recommendation:
FTB	Notice		File 6B – Peters

Amended Petition for Settlement of First and Final Account, Petition for Final Distribution and for Allowance of Compensation for Ordinary Services

	D: 9-19-13	PAUL REILLY, JR., Executor with Full IAEA	NEEDS/PROBLEMS/COMMENTS:
	D. 7-17-13	without bond, is Petitioner.	INLLUS/I ROBLINIS/COMMENIS.
		Williour Boria, is remindred.	
—		Account period: 9-19-13 through 5-20-14	
		Accounting: \$301,936.84	
		Beginning POH: \$291,429.09	
	Aff.Sub.Wit.	Ending POH: \$204,960.30 (cash)	
>	Verified	-	
~	Inventory	Executor (Statutory): \$7,478.74	
~	PTC	Attorney (Statutory): \$7,478.74	
~	Not.Cred.	, , , , , , ,	
\	Notice of	Closing: \$800.00	
	Hrg		
~	Aff.Mail	Distribution pursuant to Decedent's will:	
	Aff.Pub.	Cindy M. Bailly: \$22 /50 25	
	Sp.Ntc.	Cindy M. Reilly: \$23,650.35 Paul Reilly, Jr.: \$23,650.35	
	Pers.Serv.	Donna Reilly Mosqueda: \$23,650.35	
	Conf.	James Reilly: \$23,650.35	
	Screen	Mark Sawyer: \$23,650.35	
~	Letters	Rodney Harmecek: \$23,650.35	
	Duties/Supp	Marta Angulo Doran: \$23,650.35 Richard Angulo: \$23,650.35	
	Objections	Richard Angulo. \$25,650.55	
	Video		
	Receipt		
	CI Report		
>	9202		
>	Order]	
	Aff. Posting		Reviewed by: skc
	Status Rpt		Reviewed on: 6-26-14
	UCCJEA]	Updates:
	Citation]	Recommendation: SUBMITTED
~	FTB Notice		File 7 - Reilly

8 Schmidt Family Trust dtd 11/23/93 (Trust)

Case No. 14CEPR00436

Rindlisbacher, Curtis D. (for Beneficiary Connie Mansfield – Petitioner) Atty Atty

Wagner, Matthew C. (for Trustee David Schmidt – Respondent)

Petition to Compel Trustee to Provide Requested Documents

Donald J. Schmidt DOD: 6-19-04		CONNIE MANSFIELD, Beneficiary, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Norma E. Schmidt DOD: 8-8-09		Petitioner seeks a court order compelling Trustee David Schmidt to provide records relating to his administration of the trust relevant to her interest in the trust.	
	Aff.Sub.Wit.	Petitioner states the Schmidt Family Trust was established by Donald J. Schmidt and Norma	
×	Verified Inventory PTC	E. Schmidt on 11-23-93. Donald J. Schmidt died 6-19-04 and David Schmidt became the trustee as of that date. The trustee has	
~	Not.Cred. Notice of	provided some information to beneficiaries, but has failed to respond to requests for copies of specified records and has failed to	
✓	Aff.Pub.	provide a formal accounting including the information required by Probate Code § 16063.	
	Sp.Ntc. Pers.Serv. Conf.	Petitioner sent formal written request on 9-6- 13 for certain records, an accounting, and an explanation of certain actions by the trustee.	
	Screen Letters Duties/Supp	See petition for specific items requested. Petitioner has engaged the services of an	
>	Response Video Receipt	 accountant who will prepare an accounting based on the records to be provided, and is not making a request at this time for any order compelling a formal trust accounting. 	
	9202 Order	Petitioner requests a court order that: 1. David Schmidt, Trustee of the Schmidt	
	Aff. Posting Status Rpt	Family Trust dated 11-23-93, provide copies of certain records to Petitioner (see list in petition for details); and	Reviewed by: skc Reviewed on: 6-26-14
	Citation FTB Notice	For such further relief as the court deems appropriate.	Updates: Recommendation: File 8 - Schmidt
		Trustee David Schmidt filed a Response on 6-17-14. See Page 2.	

Page 2

Respondent states that upon the death of Donald J. Schmidt, he became Co-Trustee with Norma E. Schmidt until her death on 8-8-09, and since that date he has been sole successor trustee. Respondent alleges that he has kept the beneficiaries informed of his trust administration and denies that he has failed to provide information or accountings to them.

Furthermore, with regard to Petitioner's request for information and an accounting dated 9-6-13, Respondent alleges that this request was made 18 months after Respondent completed trust administration on 3-5-12 and had disbursed all of the monies to Petitioner, Respondent, and beneficiary Sherrie Kay Worthen. Nevertheless, Respondent's counsel contacted Petitioner's counsel by telephone regarding the request and informed Petitioner's counsel that a formal accounting would cost in excess of \$3,000.00 in accounting fees, which would have to be shared equally by the beneficiaries, since final distribution was already accomplished. Petitioner's counsel informed Respondent's counsel that he would check with Petitioner and respond. Respondent did not receive any further response until this petition was filed.

Respondent denies that he has failed to provide information to Petitioner and alleges that he has provided written status reports throughout his administration, the trust's tax returns, and with accounting information.

Respondent further alleges that Petitioner's document requests as set forth in the petition are overbroad and burdensome. In this regard, the requests are not related to the period of trust administration following the death of Norma E. Schmidt, but instead are either wholly unlimited as to time, or reach back to the date of Donald J. Schmidt's death, during which time Petitioner was not entitled to any account or trust information because Mrs. Schmidt was both a trustee and beneficiary. Probate Code §16069(b).

Respondent alleges he has provided reasonable information regarding his trust administration and periodic accounts. See memo dated 9-18-09 regarding assets and plan of distribution, schedule dated 12-17-09, letter dated 4-15-11, status report dated 9-27-11, letter dated 2-13-12, status report dated 3-5-12, balance sheets, etc. (attached).

See response for details regarding each item requested by the Petitioner.

Respondent requests the Court deny the relief requested in the petition.

Jeffrey Sassano (Estate) Co Lucich, Nicholas L., Jr. (for Gregory Sassano – Brother – Petitioner) Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DO	D: 5-10-14	GREGORY SASSANO, Brother, is Petitioner	NEEDS/PROBLEMS/COMMENTS:
	D. 3-10-14	and requests appointment as	NEEDS/TROBLEMS/COMMENTS.
		Administrator with Full IAEA without bond.	Note: If granted, status hearings will be set as follows:
		Petitioner is the sole heir and waives	
		bond.	• Tues 11-11-14 at 9:00 a.m. in
	Aff.Sub.Wit.		Department 303, for the filing
>	Verified	Full IAEA: ok	of the inventory and appraisal.
	Inventory	Decedent died intestate	• Tues 11-10-15, 2015 at 9:00
	PTC	Decedent died intestate	a.m. in Department 303, for the
	Not.Cred.	Residence: Clovis, CA	filing of the first account or
~	Notice of	Publication: Fresno Business Journal	petition for final distribution.
	Hrg		
>	Aff.Mail W	Estimated value of estate:	Pursuant to Local Rule 7.5 if the
>	Aff.Pub.	Personal property: \$ 70,000.00	required documents are filed 10
	Sp.Ntc.	Real property: \$3,500,000.00 Total: \$3,570,000.00	days prior the date set the status
	Pers.Serv.	Total: \$3,570,000.00	hearing will come off calendar and no appearance will be
	Conf.	Probate Referee: Steven Diebert	required.
	Screen		
>	Letters		
>	Duties/Supp		
	Objections		
	Video		
	Receipt		
	CI Report		
	9202		
>	Order		
	Aff. Posting		Reviewed by: skc
	Status Rpt		Reviewed on: 6-26-14
	UCCJEA		Updates:
	Citation		Recommendation: SUBMITTED
	FTB Notice		File 9 - Sassano
			0

Atty Bagdasarian, Gary G.

Atty Lind, Ruth P

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:		
		CONTINUED TO 7-15-14
		per Attorney request
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202	_	
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 6-26-14
UCCJEA	<u></u>	Updates:
Citation		Recommendation:
FTB Notice		File 10 - Dolby

11 Christopher Robles-Ordonez (GUARD/P) Case No. 11CEPR01100

DeLaCruz, Pablo (Pro Per – Non-relative – Petitioner)

Atty

Atty Avila, Alicia Galvan (Pro Per – Non-relative – Petitioner)

Atty Heredia, Rachel (Pro Per – Maternal Great-Grandmother – Current Guardian)

Petition for Appointment of Successor Guardian of the Person (Prob. C. 1510)

			PABLO DELACRUZ and ALICIA GALVAN AVILA, non-relatives, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
	Aff.Sub.Wit.		RACHEL HEREDIA, Maternal Great-Grandmother, was appointed Guardian on 4-5-12 Consents and waives notice	Note: Notice to the unknown father was previously dispensed on 4-5-12 in connection with the original guardianship petition. If notice
~	Verified		Father: UNKNOWN	is not dispensed for the father
	Inventory		- Petitioners request to dispense notice	and paternal grandparents,
	PTC		Mother: CORINA MARIA ORDONEZ - Consents and waives notice	the Court may require
	Not.Cred.		- Consents and waives notice	diligence or notice.
>	Notice of		Paternal Grandparents: Unknown	Note: Diligence regarding the
	Hrg		- Petitioners request to dispense notice	maternal grandfather was
>	Aff.Mail	W	Material Crandfather Felix Ordener	previously filed by Ms. Heredia
	Aff.Pub.		Maternal Grandfather: Felix Ordonez - Petitioners request to dispense notice	in connection with the original petition. IF notice is not
	Sp.Ntc.		Maternal Grandmother: Priscilla Ordonez	dispensed for the maternal
N/A	Pers.Serv.		- Mailed notice on 5-6-14	grandfather, the Court may
\	Conf.			require diligence or notice.
~	Screen Letters		Petitioners state the current guardian is suffering from health problems and can no	
~			longer care for the minor. She is also caring	
-	Duties/Supp Objections		for her husband, who suffered an aneurysm	
	Video		and is bed bound. The minor is two years	
	Receipt		old and very active. Petitioner Pablo	
>	DSS Report		Delacruz was originally thought to be the father, but blood tests revealed that he is	
>	Clearances		not the father. However, Petitioners have	
>	Order		already bonded with the minor and the	
	Aff. Posting		guardian and are his godparents. The	Reviewed by: skc
	Status Rpt		current guardian asked Petitioners to take over the guardianship. The mother is	Reviewed on: 6-26-14
~	UCCJEA		currently incarcerated and consents. The	Updates:
	Citation		minor has spent weekends with Petitioners	Recommendation:
	FTB Notice		frequently and is bonded with them.	File 11 – Robles-Ordonez
			DSS Social Worker Irma Ramirez filed a report on 6-20-14.	

12

Martinez, Robert Jesse (Pro Per – Non-relative – Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

			NO TEMP REQUESTED	NEEDS/PROBLEMS/COMMENTS:
			VERONICA BRITO and ROBERT JESSE MARTINEZ, Non-relatives, are Petitioners.	If notice is not dispensed,
V N/A	Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv.	X	Father: GUILLERMO HERNANDEZ - Deceased Mother: VERONICA BASULTO - Nominates, consents, and waives notice Paternal Grandfather: Guillermo Hernandez - Declaration of Due Diligence filed 5-27-14 Paternal Grandmother: Rosa Martinez - Declaration of Due Diligence filed 5-27-14 Maternal Grandfather: Unknown - Declaration of Due Diligence filed 5-27-14 Maternal Grandmother: Silvia River - Declaration of Due Diligence filed 5-27-14	need proof of service of Notice of Hearing pursuant to Probate Code §1511 on paternal and maternal grandparents. 2. Need UCCJEA Form GC-120 with information regarding the minors' residence history and other pertinent information.
*	Conf. Screen Letters		Petitioners state the mother does not have a stable home at the moment. Attached is a	
>	Duties/Supp Objections Video		Caregiver's Authorization Affidavit dated 4-30-14 and a letter from the mother dated 4-2-14 giving petitioners guardianship of the two minors.	
> >	Receipt DSS Report Clearances Order		DSS Social Worker Irma Ramirez filed a report on 6-17-14.	
	Aff. Posting Status Rpt UCCJEA	X		Reviewed by: skc Reviewed on: 6-26-14 Updates:
	Citation FTB Notice			Recommendation: File 12 – Martinez & Hernandez

Daniel Speer (Estate) Case
Speer, Jeoffery (Pro Per Administrator)
Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 4-12-13	JEOFFERY SPEER was appointed	NEEDS/PROBLEMS/COMMENTS:
303111210	Administrator with Full IAEA without	
	bond on 11-18-13.	Continued from 4-18-14, 6-6-14
Cont from 041814,	1, 1, 2, 1, 2, 1,	
060614	Letters issued on 11-20-13.	Minute Order 4-18-14:
	At the hearing on 11-20-13, the Court	No appearances. Matter continued to 6-6-14. The Court orders Jeoffery
Aff.Sub.Wit.	set this status hearing for the filing of the	Speer to be personally present on
Verified	Inventory and Appraisal.	6-6-14 if the inventory and appraisal
Inventory		has not been filed.
PTC		A copy of the minute order was
Not.Cred.		mailed to Mr. Speer on 4-18-14.
Notice of		
Hrg		Minute Order 6-6-14:
Aff.Mail		No appearances. Matter continued
Aff.Pub.		to 7-1-14. The Court orders Jeoffery Speer to be personally present on
Sp.Ntc.		6-6-14 if the inventory and appraisal
Pers.Serv.		has not been filed.
Conf.		
Screen		A copy of the minute order was
Letters		mailed to Mr. Speer on 6-13-14.
Duties/Supp		As of 6-25-14, nothing further has
Objections		been filed.
Video		
Receipt		Note: The petition for probate
CI Report		estimated the estate value at \$341,893.00, including real and
Order		personal property.
Older		polociiai proponiți
		Need I&A per Probate Code
		§8800 or verified written status
		report pursuant to local rules.
Aff. Posting	1	Reviewed by: skc
Status Rpt	1	Reviewed on: 6-25-14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 13 – Speer
		13

Tu, Anh Phu (pro per Petitioner)

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DC	D: 2/24/12		AND PULLTU curviving engues is	NEEDS/PROBLEMS/COMMENTS:
DOD: 2/26/12			ANH PHU TU , surviving spouse, is petitioner and requests appointment	NEEDS/FROBLEMS/COMMENTS:
			as Administrator with without bond.	
			do / talliminator with without bolid.	Need Affidavit of Publication.
			All heirs waive bond.	
Co	nt. from			2. Need Order.
	Aff.Sub.Wit.		Full IAEA - need publication.	
✓	Verified		Decedent died intestate.	
	Inventory			
	PTC		Residence: Fresno	Note: If the petition is granted, status
	Not.Cred.		Publication: NEED	hearings will be set as follows:
	Notice of			
	Hrg			• Friday, August 19, 2015 at 9:00
✓	Aff.Mail	W/	Estimated value of the Estate:	a.m. in Department 303, for the filing of the first account or
	Aff.Pub.	Χ		petition for final distribution.
	Sp.Ntc.		Real property - \$8,099.00	
	Pers.Serv.		(\$331,293.00 less encumbrances of	Pursuant to Local Rule 7.5 if the
	Conf.		\$323,194.00.)	required documents are filed 10
	Screen			days prior the date set the status
√	Letters		Probate Referee: RICK SMITH	hearing will come off calendar and no appearance will be required.
✓	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
	Order	Χ		
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 6/26/14
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 14 - Dunn

Molloy, Edward III (Pro Per – Administrator)

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 05/22/2012	EDWARD MOLLOV was appointed	NEEDS/PROBLEMS/COMMENTS:
DOD: 05/23/2013	EDWARD MOLLOY, was appointed Administrator with full IAEA authority	NEEDS/PROBLEMS/COMMENTS:
	without bond on 02/11/2014.	Minute Order of 04/04/2014: No
	WIITIOUT DOTIG OFF 02/11/2014.	Minute Order of 06/06/2014: No appearances. Edward Molloy is
	Letters issued on 02/11/2014.	ordered to be personally present on
Cont. from 060614	Leners 1550ed On 02/11/2014.	07/01/2014 if the Inventory and
Aff.Sub.Wit.	Minute Order of 02/11/2014 set this	Appraisal has not been filed.
Verified	status hearing for the filing of the	
Inventory	Inventory and Appraisal.	Copy of Minute Order mailed to
PTC		Edward Molloy on 06/13/2014.
Not.Cred.		Need Inventory and Appraisal or
Notice of		current written status report
Hrg		pursuant to Local Rule 7.5 which
Aff.Mail		states in all matters set for status
Aff.Pub.		hearing verified status reports
Sp.Ntc.		must be filed no later than 10
Pers.Serv.		days before the hearing. Status
Conf.		Reports must comply with the
Screen		applicable code requirements.
Letters		Notice of the status hearing,
Duties/Supp		together with a copy of the Status
Objections		Report shall be served on all
Video		necessary parties.
Receipt		,, , , , , , , , , , , , , , , , , , , ,
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LV
Status Rpt		Reviewed on: 06/26/2014
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 15 - Molloy
	·	15

Calhoun, Ronald L (Pro Per – Executor)

Status Hearing Re: Filing of the Inventory and Appraisal

Status Hearing Re: Filing of the Inventory and Appraisal					
DOD: 05/17/2013	RONALD CALHOUN, was appointed	NEEDS/PROBLEMS/COMMENTS:			
	Executor with full IAEA authority without				
	bond on 01/27/2014.	Minute Order of 06/06/2014: No			
	=	appearances. Ronald Calhoun is			
2 1 1 2 2 2 2 2 2	Letters issued on 01/28/2014.	ordered to be personally present on			
Cont. from 060614		07/01/2014 if the Inventory and			
Aff.Sub.Wit.	Minute Order of 01/06/2014 set this	Appraisal has not been filed.			
Verified	status hearing for the filing of the				
Inventory	Inventory and Appraisal.	Copy of Minute Order mailed to			
PTC	1	Ronald Calhoun on 06/13/2014.			
Not.Cred.	1	2. Need Inventory and Appraisal or			
Notice of	1	current written status report			
Hrg		pursuant to Local Rule 7.5 which			
Aff.Mail	1	states in all matters set for status			
Aff.Pub.	1	hearing verified status reports			
Sp.Ntc.		must be filed no later than 10			
Pers.Serv.		days before the hearing. Status			
Conf.	1	Reports must comply with the			
Screen		applicable code requirements.			
Letters	1	Notice of the status hearing,			
Duties/Supp		together with a copy of the Status			
Objections	1	Report shall be served on all			
Video	1	necessary parties.			
Receipt		riocossary paritos.			
CI Report	1				
9202	1				
Order	1				
Aff. Posting	1	Reviewed by: LV			
Status Rpt]	Reviewed on: 06/26/2014			
UCCJEA]	Updates:			
Citation		Recommendation:			
FTB Notice		File 16 - Ello			
		14			

Scott, Sheila R. (pro per Petitioner)

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

SHEILA R. SCOTT, mother, is petitioner and requests appointment as conservator of the person with medical consent powers and conservator of the person with medical consent powers and conservator of the estate without bond. Aff.Sub.Wit. Verified	Age: 27 years TEMPORARY EXPIRES 7/1/14 NEEDS/PROBLEMS/COMMENTS:					
requests appointment as conservator of the person with medical consent powers and conservator of the estate without bond. Aff.Sub.Wift. / Verified Inventory PTC Not.Cred. Notice of Herry Aff.Mail X Aff.Pub. Pers.Serv. X Conf. Screen Juites/Supp Objections / Video Receipt / Cl Report 9202 / Order Aff. Posting Status Rpt UCCJEA Aff. Posting Status Rpt UCCJEA Citlation X Aff. Posting Status Rpt UCCJEA Citlation X Tequests appointment as conservator of the estate without bond. Tequests appointment as conservator of the person with medical consent powers and conservator of the estate: \$0 Declaration of Stephen Grossman, M.D., 5/22/14 supports the request for medical consent powers. Petitioner states the proposed conservatee cannot breathe or eat on her own, She cannot make financial decisions on her own behalf. Court Investigator Jennifer Young's Report filed on 6/25/14. Probate Referee: Rick Smith (if conservatorship of the estate is granted) Aff. Posting Status Rpt UCCJEA Citlation X	Age: 27 years				·	
and conservator of the estate without bond. Aff.Sub.Wit. ✓ Verified Inventory PTC Not.Cred. Notice of Hearing along with a copy of the Petition on Service of the Notice of Hearing along with a copy of the Petition on Subject (maternal grandparent) Not.Cred. Notice of Aff.Nall X Aff.Pub. Sp.Ntc. Pers.Serv. X Conf. Screen ✓ Duties/Supp Objections ✓ Video Receipt ✓ CI Report 9202 ✓ Order Aff. Posting Status Rpt UCCJEA Aff. Posting Status Rpt UCCJEA Citation X Aff. Posting Status Rpt UCCJEA Citation Aff. Sosting Aff. Commendation: Aff. Secommendation: Aff. Posting Citation Aff. Posting Aff. P				requests appointment as conservator of	on 6/20/14.	
Aff. Posting Status Rpt	Со			and conservator of the estate without	2. Need proof of service of the	
Inventory	✓				a copy of the Petition on:	
Not.Cred. Notice of Hrg X Hrg X Aff. Mail X Aff. Pub. Sp.Ntc. Pers.Serv. X Conf. Screen V Duties/Supp Objections V Video Receipt Y Cl Report 9202 V Order Aff. Posting Status Rpt UCCJEA Citation X Video Raff. Posting Status Rpt UCCJEA Citation X					grandparent)	
Not.Cred. Notice of Hrg Aff.Mail X Aff.Pub. Sp.Ntc. Pers.Serv. X Conf. Screen Objections Video Receipt VCI Report Aff. Posting Status Rpt Light Status Rpt UCCJEA Citation X Aff. Posting Status Rpt Light Status Rpt Aff. Notice of Hrg at Refered Rick Smith proposed conservatee cannot talk or move her limbs. She cannot make financial decisions on her own behalf. Court Investigator Jennifer Young's Report filed on 6/25/14. Probate Referee: Rick Smith (if conservatorship of the estate is granted) Note: If the conservatorship of the estate is granted) Note: If the conservatorship of the estate is granted as a follows: Friday, April 26, 2013 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Friday, January 24, 2014 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required. Reviewed by: KT Reviewed on: 6/27/14 Updates: Recommendation:					•	
Notice of Hrg Aff.Mail X Aff.Pub. Sp.Ntc. Pers.Serv. X Conf. Screen Dutles/Supp Objections Video Receipt Video Receipt Video Receipt Fig. 20 Aff. Posting Status Rpt Aff. Posting Status Rpt UCCJEA Citation X Cannot breathe or eat on her own. She cannot make financial decisions on her own behalf. Need proof of personal service of the Citation on the proposed conservatee. Need proof of personal service of the Citation on the proposed conservatee. Need proof of personal service of the Citation on the proposed conservatee. Need proof of personal service of the Citation on the proposed conservatee. Need proof of personal service of the Citation on the proposed conservatee. Note: If the conservatorship of the estate is granted. Friday, April 26, 2013 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Friday, January 24, 2014 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required. Reviewed by: KT Reviewed on: 6/27/14 Updates: Recommendation:				·		
Aff. Posting Aff. Posting Aff. Posting Aff. Posting Aff. Posting Aff. Posting Sandar are for herself in any way. She cannot make financial decisions on her own behalf. Care for herself in any way. She cannot make financial decisions on her own behalf. Court Investigator Jennifer Young's Report filed on 6/25/14. Probate Referee: Rick Smith (if conservatorship of the estate is granted) Dijections Video Receipt Order Aff. Posting Status Rpf UCCJEA Citation X Care for herself in any way. She cannot make financial decisions on her own behalf. Court Investigator Jennifer Young's Report filed on 6/25/14. Probate Referee: Rick Smith (if conservatorship of the estate is granted) Friday, April 26, 2013 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Friday, April 26, 2013 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required. Reviewed by: KT Reviewed on: 6/27/14 Updates: Recommendation:			Χ	cannot breathe or eat on her own. She	3. Need citation.	
Aff. Pub. Sp.Ntc. Pers. Serv. X ✓ Conf. Screen ✓ Letters ✓ Duties/Supp Objections ✓ Video Receipt ✓ Order Aff. Posting Status Rpt UCCJEA Citation X Aff. Posting Status Rpt Court Investigator Jennifer Young's Report filled on 6/25/14. Probate Referee: Rick Smith (if conservatorship of the estate is granted) Probate Referee: Rick Smith (if conservatorship of the estate is granted) Friday, April 26, 2013 at 9:00 a.m. in Department 303, for the filling of the inventory and appraisal. Friday, January 24, 2014 at 9:00 a.m. in Department 303, for the filling of the first account or petition for final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required. Reviewed by: KT Reviewed on: 6/27/14 Updates: Recommendation:		Aff.Mail	Χ		l	
Sp.Ntc. Pers.Serv. X Conf. Screen		Aff.Pub.		· · ·	proposed conservatee.	
Court Investigator Jennifer Young's Report filed on 6/25/14. Probate Referee: Rick Smith (if conservatorship of the estate is granted) ✓ Duties/Supp Objections ✓ Video Receipt ✓ Order Proder Aff. Posting Status Rpt UCCJEA Citation Court Investigator Jennifer Young's Report filed on 6/25/14. Probate Referee: Rick Smith (if conservatorship of the estate is granted) Friday, April 26, 2013 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Friday, January 24, 2014 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required. Reviewed by: KT Reviewed on: 6/27/14 Updates: Recommendation:		Sp.Ntc.				
✓ Conf. Screen filed on 6/25/14. Friday, April 26, 2013 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. ✓ Duties/Supp ✓ Video Receipt Friday, April 26, 2013 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. ✓ CI Report Friday, January 24, 2014 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. ✓ Order Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required. Aff. Posting Status Rpt UCCJEA Citation X Reviewed on: 6/27/14 Updates: Recommendation:		Pers.Serv.	Χ	Court Investigator Jennifer Young's Report	· ·	
 ✓ Letters ✓ Duties/Supp Objections ✓ Video Receipt ✓ CI Report ✓ Product Produc	✓			•		
 ✓ Duties/Supp ✓ Objections ✓ Video Receipt ✓ CI Report ✓ 9202 ✓ Order ✓ Order Aff. Posting Status Rpt UCCJEA Citation X X Friday, January 24, 2014 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required. Reviewed by: KT Reviewed on: 6/27/14 Updates: Recommendation: 	√			·		
 Video Receipt ✓ CI Report 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required. Aff. Posting Aff. Posting Status Rpt UCCJEA Citation X Priday, January 24, 2014 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required. Reviewed by: KT Reviewed on: 6/27/14 Updates: Recommendation: 	✓				the filing of the inventory and	
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y Order Order Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required. Aff. Posting Status Rpt UCCJEA Citation Citation Corder Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required. Reviewed by: KT Reviewed on: 6/27/14 Updates: Recommendation:	✓				9:00 a.m. in Department 303,	
y Order Order Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required. Aff. Posting Status Rpt UCCJEA Citation X distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required. Reviewed by: KT Reviewed on: 6/27/14 Updates: Recommendation:	✓	CI Report				
Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required. Aff. Posting Status Rpt UCCJEA Citation Reviewed on: 6/27/14 Updates: Recommendation:		9202			l ·	
Status Rpt UCCJEA Citation X Reviewed on: 6/27/14 Updates: Recommendation:	✓	Order			required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be	
UCCJEA Updates: Citation X Recommendation:		Aff. Posting			-	
Citation X Recommendation:					Reviewed on: 6/27/14	
FIB Notice File 17 - Foster			Χ			
		FTB Notice			File 17 - Foster	

Varney, Bruce (Pro Per – Son – Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DO	D: 4-27-14		BRUCE VARNEY , Son and named executor without bond, is Petitioner.
			Petitioner is a resident of Fairview, North Carolina.
	Aff.Sub.Wit.		IAEA is not requested.
<u> </u>	Verified Inventory		Will dated 4-25-12
	PTC Not.Cred.		Residence: Fresno
~	Notice of		Publication: Need publication
>	Hrg Aff.Mail	w/o	Estimated value of estate: Real property: \$150,000.00
	Aff.Pub. Sp.Ntc.	Χ	Probate Referee: Steven Diebert
	Pers.Serv.		
	Conf. Screen		
>	Letters		
>	Duties/Supp		
	Objections		
	Video		
	Receipt		
	CI Report		
.4	9202		
•	Order		
	Aff. Posting		
	Status Rpt		
<u> </u>	UCCJEA		

Citation

FTB Notice

NEEDS/PROBLEMS/COMMENTS:

- 1. Need publication pursuant to Probate Code §8120.
- 2. Petition is incomplete at #7 or #8 (issue of predeceased child).
- 3. Petitioner is a resident of Fairview, North Carolina. The Court may require bond if the proposed personal representative resides outside California or for other good cause, even if the will waives bond, pursuant to Cal. Rules of Court 7.201 (b) and Probate Code §8571.

Note: If granted, status hearings will be set as follows:

- Tues 8-19-14 9:00 a.m. in Department 303, for the filing of the bond, if required.
- **Tues 11-11-14** at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.
- Tues 11-10-15, 2015 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

Reviewed by: skc
Reviewed on: 6-26-14
Updates:
Recommendation:
File 18 - Varney

Atty Teixeira, J. Stanley, sole practitioner (for Petitioners Keith D'Ambrosio, second cousin, and Donna K. Farris, proposed Conservatee)

Petition for Appointment of Temporary Conservator of the Person and Estate

Ag	e: 59 years		GENERAL HEARING SET FOR 7/30/2014	NEEDS/PROBLEMS/ COMMENTS:
Co	ont. from		KEITH D'AMBROSIO, second cousin, and DONNA K. FARRIS, proposed Conservatee, are Petitioners and request KEITH D'AMBROSIO be appointed as Conservator of the Person and Estate with bond to be	Court Investigator Advised Rights on 6/20/2014.
	Aff.Sub.Wit.		filed following determination of the potential interest of	Note Re Bond:
1	Verified		the proposed Conservatee in the ESTATE OF TOM STEEL being administered in Oklahoma.	Petitioners state
	Inventory		being daministered in Oxidhoma.	that once a
	PTC		Estimated Value of the Estate:	reasonably estimated value of
	Not.Cred.		Personal property - undetermined	her interest is
1	Notice of		Patitionary state the proposed Conservates is	determined,
	Hrg		Petitioners state the proposed Conservatee is developmentally disabled and has recently moved	Petitioners will file
✓	Aff.Mail	W/	from Oklahoma to California to be with family here, as	a declaration as to the value of the
	Aff.Pub.		TOM STEEL, who was acting as her unofficial guardian	estate and the
	Sp.Ntc.		and with whom she had been residing in Oklahoma, died earlier this year and the proposed Conservatee	amount of the
	Pers.Serv.	N/A	was left alone without any other family in Oklahoma.	bond to be
✓	Conf.		Petitioners state TOM STEEL was acting as guardian of	furnished. Status Hearing will be set
	Screen		proposed Conservatee without appointment by the	at the time of the
✓	Letters		Court in Oklahoma, and the proposed Conservatee	general hearing
✓	Duties/Supp		may be entitled to assets in TOM STEEL'S estate, and may have claims that property in his estate was	for filing proof of bond.
	Objections		misappropriated. Petitioners state that Petitioner's	, soria.
	Video Receipt		attorney is in communication with the attorney handling matters related to TOM STEEL'S estate;	
1	CI Report		however, the nature and extent of the proposed Conservatee's interest in the estate is undetermined at	
	9202		this time, and the Oklahoma attorney cannot pursue	
✓	Order		any interest the proposed Conservatee may have in TOM STEEL'S estate without appointment of a	
	Aff. Posting		Conservator for her.	Reviewed by: LEG
	Status Rpt		20.33 3.0	Reviewed on:
			Court Investigator Julie Negrete's Report was filed on	6/26/14
	UCCJEA		6/25/2014.	Updates:
	Citation	N/A		Recommendation:
	FTB Notice			File 19 - Farris

ProPer Brown, Andrew L. (pro per – mother's fiancé/Petitioner)
ProPer Jimenez, Connie (pro per – maternal aunt/Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 11	TEMPORARY EXPIRES 07/01/2014	NEEDS/PROBLEMS/COMMENTS:
Cont. from 020414, 042214 Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters	ANDREW BROWN, mother's fiancé, and CONNIE JIMENEZ, maternal aunt are petitioners. Father: DARNELL ROBINSON Mother: CYNTHIA VALDEZ - Consent and Waiver of Notice filed 12/13/2013 Paternal Grandfather: Paternal Grandmother: Maternal Grandfather: ROBERT VALDEZ – served by mail on 12/06/13 Maternal Grandmother: JANET MARIE JIMENEZ – served by mail on 12/06/13 Petitioners state: Da'Veon's mother, Cynthia Valdez, has been diagnosed with Stage 4	NEEDS/PROBLEMS/COMMENTS: CONTINUED FROM 04/22/14 Minute Order from 04/22/14 states: Petitioners need to fill out ICWA and file it. The Court finds that Mr. Robinson has been given actual notice. Temporary Letters extended to 07/01/14. Note: The required ICWA notices were mailed on 04/25/14. (60 day waiting period elapsed on 06/24/14). As of006/26/14, a response has been received by the Bureau of Indian Affairs indicating that they defer to the tribe indicated in the notice. No response has been received from the tribe. 1. Need service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Guardianship or Consent & Waiver of Notice or Declaration of Due Diligence for: a. Darnell Robinson (father) – personal service required b. Paternal grandfather – service by mail sufficient c. Paternal grandmother – service by mail sufficient
Leneis	mother, Cynthia Valdez, has	
	Court Investigator Charlotte Bien filed a report on 01/24/14.	20